Roles and Responsibilities Matrix
Project Portfolio Management (PPM) Application Portfolio Management (APM)

User Roles	Contributor[2]	Agency Reviewer	Agency Approver	Agency Application Reviewer[3]	State Reviewer	State Approver	State CIO (Final approver)
Summary Description of Role[1]	Contributors will have the ability to create/update both projects and applications that they are specifically assigned to. Agency Project Managers typically belong to this role.	Agency Reviewers will have view access to their assigned agency's full inventory of projects and applications. They serve as reviewers in the project status reporting and approval process. Agency PMO, Architecture, Security & Budget personnel typically belong to this role.	Agency Approver rights are similar to those of Agency Reviewers, but they are required to approve/reject (sign-off) projects before they can move forward in the workflow. Agency CIO's & CFO's belong to this role.	Application Reviewers have the ability to view applications and run reports on the agency's application inventory. Similar to the Agency Reviewer role, but for users who have access to only applications, not projects.	State Reviewers will have view access to the State's full inventory of projects and applications. They serve as reviewers in the project status reporting and approval process. State Oversight - Budget Analysts, EPMO, & EA users typically belong to this role.	State Approver rights are similar to those of State Reviewers, but they are required to approve/reject (sign-off) projects before they can move forward in the workflow. State Oversight Leaders - Head of EPMO, OSBM, Statewide Security & Architecture belong to this role.	Similar to State Approver rights, the State CIO role will have access to the State's portfolio of projects and applications and be the final project approvers in each workflow phase. State CIO & DCIO belong to this role.
User Rights - Projects[4]							
Create a new project	Yes	No	No	No	No	No	No
Edit project data	Yes, entire project	Yes, but limited to (Issues & Risks and Document Management Tabs)	Yes, but limited to (Issues & Risks and Document Management Tabs)	No	Yes, but limited to (Issues & Risks and Document Management Tabs)	Yes, but limited to (Issues & Risks and Document Management Tabs)	Yes, but limited to (Issues & Risks and Document Management Tabs)
Delete project data	Yes—all contributors can add or delete	No	No	No	No	No	No
View all projects within an agency	Note: only if assigned by practice to all agency projects	Yes	Yes	No	Yes	Yes	Yes
Required to act before project moves forward in workflow	Yes—all contributors must approve before the project can move forward.	No	Yes	No	No	Yes	Yes
Enter comments during workflow approval	Yes	No, but may be included in a future release	Yes	No	No, but may be included in a future release	Yes	Yes
Receive notification when a project is moved to the appropriate approval stage	No, but contributors will be notified after State CIO approval or if project is rejected during approval process	Yes	Yes	No	Yes	Yes	Yes
Run project level reports	Yes, for assigned projects	Yes, for all projects in assigned agency	Yes, for all projects in assigned agency	No	Yes, for all projects in State of NC	Yes, for all projects in State of NC	Yes, for all projects in State of NC
Run portfolio level reports (for projects)	No	Yes, for all projects in assigned agency	Yes, for all projects in assigned agency	No	Yes, for all projects in State of NC	Yes, for all projects in State of NC	Yes, for all projects in State of NC
Delete Projects	No	No	No	No	No	No	No
User Rights - Applications							
Create a new application	Yes	No	No	No	No	No	No
Edit application data	Yes, entire application	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab	Yes, but limited to Document Management Tab
Delete application data	Yes, all assigned contributors can add or delete data	No	No	No	No	No	No
View all applications within an agency	Note: only if assigned by practice to all agency applications	Yes	Yes	Yes	Yes	Yes	Yes
Run portfolio level reports (for applications)	No	Yes, for all applications in assigned agency	Yes, for all applications in assigned agency	Yes, for all applications in assigned agency	Yes, for all applications in State of NC	Yes, for all applications in State of NC	Yes, for all applications in State of NC
Delete applications	No	No	No	No	No	No	No

1: Full description of user roles containted in PPM Tool Roles & Responsibilities doc V1.0

2: User rights for contributors only apply if they are assigned to specific applications or projects

3: New user role for Application Portfolio Management. Created for Agency users who only require access to applications, not projects.

4: Edit, Review & Approval user rights for projects will also be applicable for Expansion Budget Requests

An additional role for "Agency PMO" is available. Typically reserved for Agency PMO staff, this role combines the user rights of contributors and agency approvers.